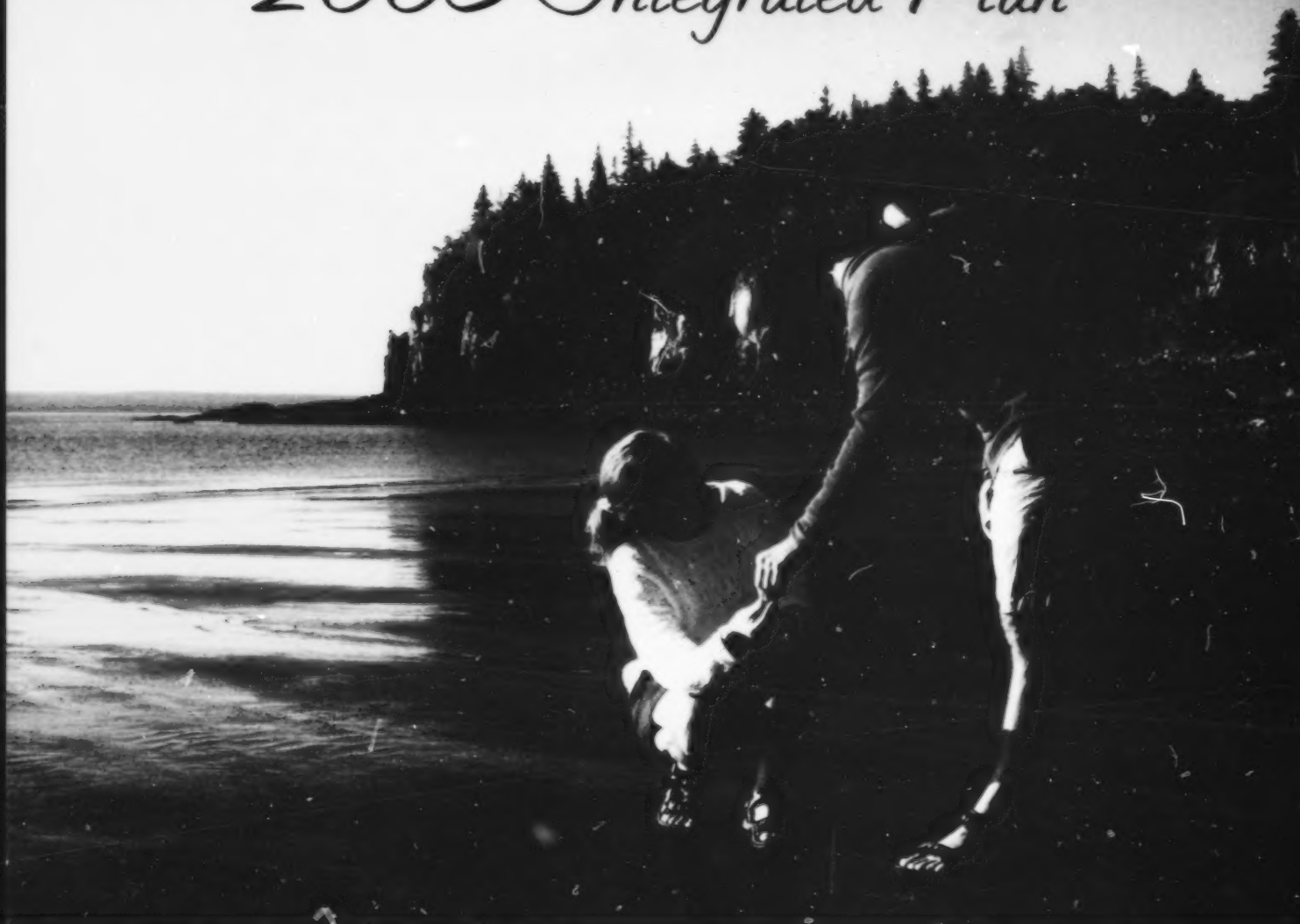


TOURISM PARTNERSHIP COUNCIL

# NOVA SCOTIA

*2003 Integrated Plan*



ATLANTIC  
CANADA



ONTARIO



QUÉBEC



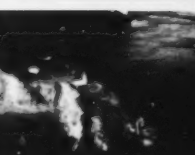
NORTH  
EASTERN US



EUROPE



NICHE  
MARKETS



ALL  
MARKETS

  
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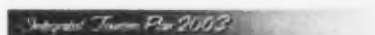
  
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Tourism and Culture





**Today's presentation:**

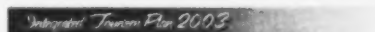
- A vision for tourism
- Situation analysis
- Nova Scotia's tourism strategy
- The integrated tourism plan for 2003



**5 - 10 Years and beyond: Vision**

**3 - 5 Years: Tourism Strategy**

**This Year: Integrated Plan**





### **Our Vision:**

**100% Tourism revenue growth over the next decade!**

- Change
- Think differently
- Raise the bar
- Critical to 'real' growth
- It's about tomorrow
- Tourism 1st!

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1 8 0 0 7 7 1 1



### **Situation analysis:**

- Overview
- 2002 in review
- What's ahead

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### Unprecedented tourism environment:

- Post-September 11th uncertainty
- Forecasting models almost irrelevant!
- Transportation access challenges
- Volatile consumer mind-set
- Dramatic increases in marketing spending by competing destinations

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### Our approach to 2002 and the post-911 world:

- **"Alert, reasoned and strategic"** response to unpredictable business planning environment
- Stepped up efforts in Northeast USA
- Leveraged extra marketing resources in domestic market

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### Reflected in results

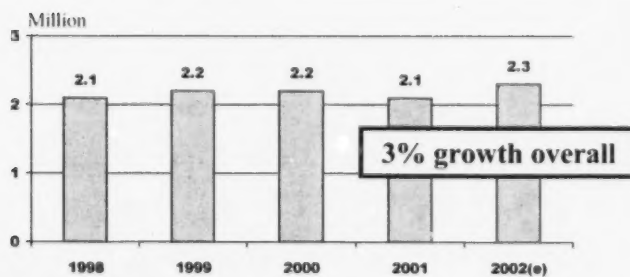
- Slow start to season
- Late bookings
- Significant shifts in visitor origin
- Overall positive growth

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### Non-resident visitation 1998-2002(e)



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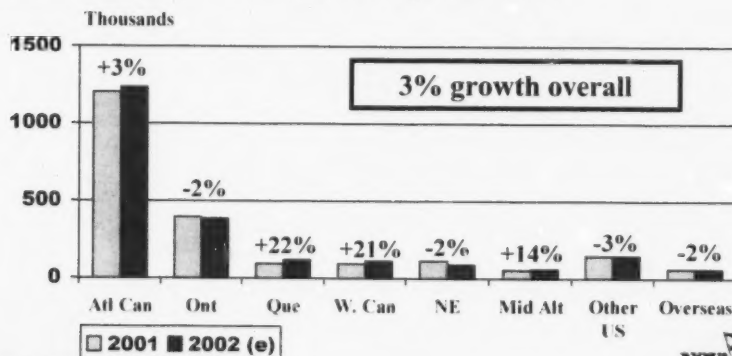
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# Situation Analysis

2002 in review

## Non-resident visitation by market



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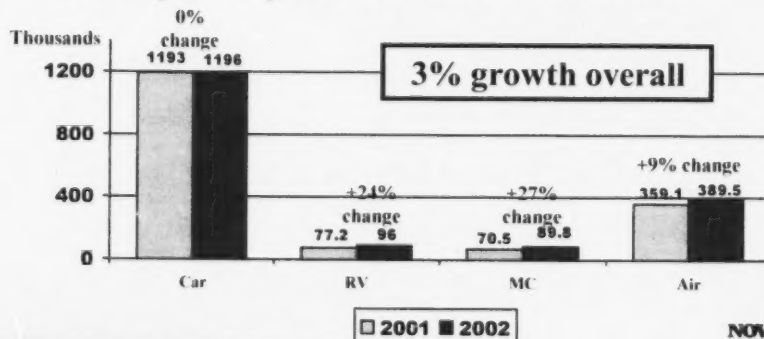
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# Situation Analysis

2002 in review

## Non-resident visitation by mode January – September 2001 vs. 2002



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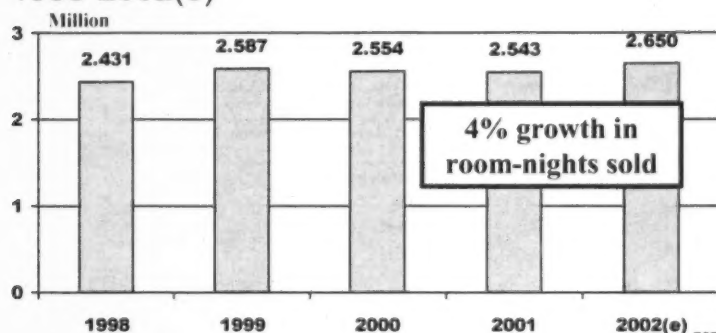
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## Situation Analysis

2002 in review

Room-nights sold  
1998-2002(e)



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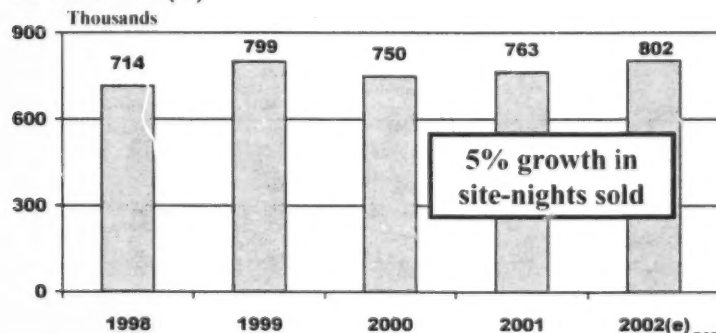
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## Situation Analysis

2002 in review

Campsite-nights sold  
1998-2002(e)

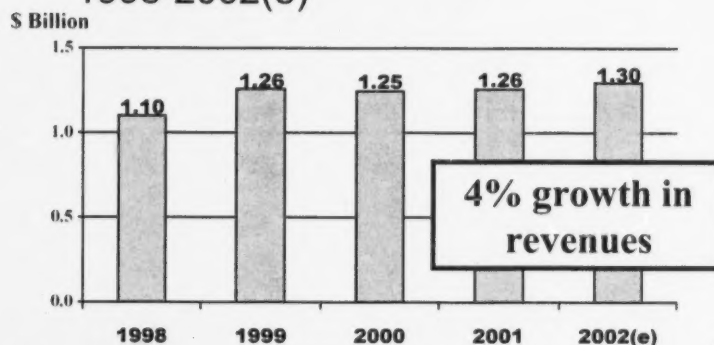


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## Tourism's economic impact 1998-2002(e)



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Direct-response marketing model:

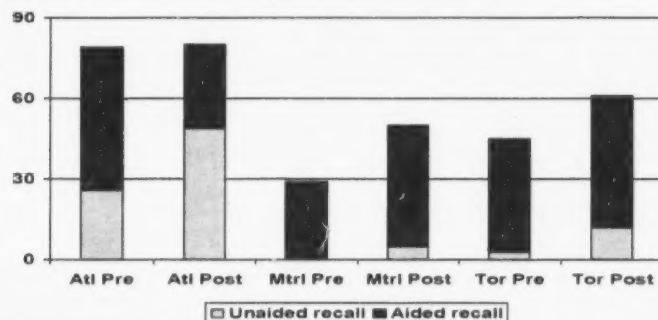
**Awareness → Inquiries → Conversion → \$\$\$**

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## Awareness of Nova Scotia Tourism advertisements in past six months



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## Ad-generated inquiries by market January to October, 2002 vs. 2001

|          | Atl. Can. | Quebec | Ontario | USA     | Other  | Total   |
|----------|-----------|--------|---------|---------|--------|---------|
| 2002     | 17,879    | 65,195 | 69,297  | 153,532 | 12,022 | 317,925 |
| 2001     | 15,983    | 43,783 | 45,779  | 162,662 | 10,782 | 278,989 |
| % change | +12       | +49    | +51     | -6      | +12    | +14     |

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Ad-generated inquiries by media type  
January to October, 2002 vs. 2001

|          | Direct Mail | Internet | Magazine | News-paper | Radio | TV     | Other  | Total   |
|----------|-------------|----------|----------|------------|-------|--------|--------|---------|
| 2002     | 106,398     | 6,972    | 122,539  | 12,621     | 350   | 27,418 | 41,627 | 317,925 |
| 2001     | 88,378      | n.a.     | 107,821  | 26,075     | 38    | 29,531 | 26,506 | 278,989 |
| % change | +20         | n.a.     | +14      | -52        | +821  | -7     | +57    | +14     |

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Ad-generated inquiry reply method  
January to October, 2002 vs. 2001

|          | Telephone | BRC     | Internet/Email | Other  | Total   |
|----------|-----------|---------|----------------|--------|---------|
| 2002     | 54,863    | 150,761 | 44,577         | 67,724 | 317,925 |
| 2001     | 90,131    | 107,911 | 20,665         | 60,282 | 278,989 |
| % change | -40       | +40     | +116           | +12    | +14     |

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#### **Canadian market conditions:**

- Economy: Improving albeit at a slower pace
- Global Politics: Concerns over potential conflict in Middle East
- Improving domestic air transportation capacity
- Increased transportation costs: security charges, airport improvement fees; Car rental prices
- Canadian Travel Intentions are up compared to 2001
- Three major events put Nova Scotia on national stage
- Acadian Celebrations 2003-2005

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#### **United States market conditions:**

- Economy improving albeit at a slower pace
- Stock market concerns affecting business travel as well as retirees (and those close to retirement) who are less likely to leisure travel
- Concerns over potential conflict in Middle East
- Increasing American propensity to visit 'safe' destinations

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**European market conditions:**

- UK and French economies strong
- Germany's economy has weakened
- Concerns over potential conflict in Middle East
- Air access - some improvement but still a concern

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- Increase in short-haul destinations by road
- More last minute bookings/walk-ins
- Internet usage on the rise
- Opportunities to lever significant events over next three years

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- Built on successes of 1996 Strategy for Tourism
- Based on extensive industry consultation and private/public sector collaboration
- Unveiled at 2000 Fall Tourism Conference
- Integrates marketing, product development, partnerships, research and policy initiatives into one plan
- Provides common direction and structure for annual work plans

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#### High-level goals

- **Three high-level goals:**
  - Industry Growth
  - Sustainability
  - Quality of Life

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- **The Brand positioning statement is critical because:**
  - Common "prime directive" for all product development and marketing initiatives
  - **Not** advertising copy
  - Who we are trying to be in the market place
- **Specific format:**
  - Our audience
  - What we are trying to be
  - Why this position is credible to our audience

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**"To people who appreciate the sea,  
 Nova Scotia is Canada's foremost seacoast  
 destination  
 that offers an authentic experience for your body and  
 soul better than any other destination  
 because  
 only Nova Scotia uniquely combines  
 spectacular scenery, living tradition, maritime  
 culture and lifestyle with a feeling of deep-down  
 spiritual satisfaction."**

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1st Level Priorities

- Grow revenues from the experiential touring market
- Improve the quality, competitiveness and sustainability of our product

2nd Level Priority

- Build a 12-month season

3rd Level Priorities

- Develop viable niche markets
- Improve transportation access
- Improve the business environment

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- Our second annual integrated plan
- Incorporates marketing, product development, sales, partnerships, policy and research initiatives
- Addresses the six strategic objectives of our Tourism Strategy

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- Council Executive Committee
- Selection Committee
- Vision Committee
- Policy Committee
- Product Development Committee
- Marketing Committee
- E-Marketing Committee
- Tourism Strategy Implementation Committee
- Visitor Information Services Committee
- Integrated Resource Management Committee
- Destination Marketing and Product Development Program
- Annual Marketing Plan Task Force
- Annual Product Development Plan Task Force

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- Adopt and implement the E-Marketing Strategy
- Focus product development efforts on:
  - Seasonality
  - Market-readiness & quality
  - Sustainability
- Develop new niche-market products and experiences to extend the season
- Build and strengthen current partnerships
- Find new non-traditional partners

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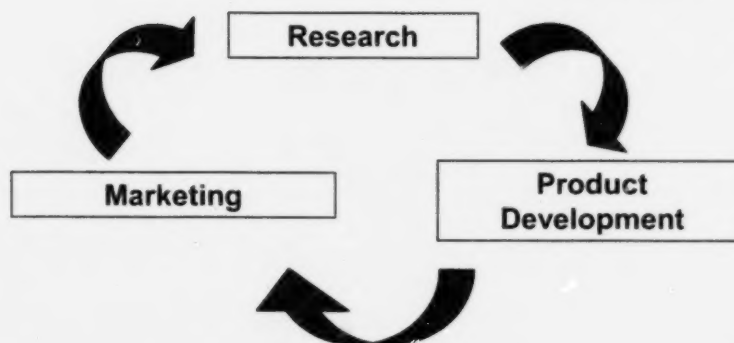




- Test new market opportunities
  - Motorcycle market
  - Cuisine and wine
- Build on programs directed at golf, outdoor, meetings and conventions, group touring (motorcoach & cruise)
- Enhance coastal experiences and access through products and experiences
- Review recommendations from the Visitor Information Services Strategy

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## **Grow revenues from the experiential touring market**

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### **Grow revenues from the experiential touring market**

- Customers combining a variety of experiences
- Largest share of "marketable" trips
- Overlap with other markets - an "amalgam of niche products"
- Shares top priority with "Quality" objective

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## *Strategic Objective #1*

Name of the game...

- **Maximize revenues from experiential touring**

- Identify highest yield markets, opportunities and customer needs
- Match with market-ready product
- Attract visitors
- Bring visitors together with our product
- Maximize visitor satisfaction
- Maximize visitor yield
- Measure results: evaluate and learn!

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## *Strategic Objective #1*

Markets

- Atlantic Canada
- Quebec
- Ontario
- Northeast USA
- Europe

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## Strategic Objective #1

### Who is the customer? Demographics

|                                           | Atl. Can.                                                      | Quebec                               | Ontario                                       | USA                              | Europe           |
|-------------------------------------------|----------------------------------------------------------------|--------------------------------------|-----------------------------------------------|----------------------------------|------------------|
| <b>Age Party Composition</b>              | 35-54<br>Female skew<br>Families                               | 45-64<br>Female skew<br>Couples      | 45-64<br>Female skew<br>Couples /<br>Families | 45-64<br>Female Skew<br>Couples  | 35-64<br>Couples |
| <b>Household Income (\$ 000s)</b>         | 25-45                                                          | 60-80                                | 60-80                                         | 60-80                            | 80+              |
| <b>Mode of Travel: Primary/Secondary</b>  | Car                                                            | Car                                  | Car/Ferries                                   | Car/Ferries                      | Air              |
| <b>Education</b>                          | Post-secondary                                                 | Post-graduate                        | Post-graduate                                 | Post-graduate                    | Post-secondary   |
| <b>Market segments: Primary/Secondary</b> | Southern NB/<br>PEI, NS<br>(Rural/urban NS<br>seasonal shifts) | Montreal and<br>surrounding<br>areas | Greater TO                                    | Greater Boston<br>area and Maine | UK, Germany      |

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## Strategic Objective #1

### Who is the customer? Psychographics

| Atl. Can.                              | Quebec                                                                                                        | Ontario                                                                 | USA                                                                                    | Europe                                                                                                             |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Maritime values                        | High achievers                                                                                                | High status individuals                                                 | High status individuals                                                                | Well educated with disposable income                                                                               |
| Families want short get-away vacations | Want bragging rights<br><br>Desire to be close to the sea<br><br>Usually stay in camp grounds or hotel motels | High accomplishments<br><br>Very active<br><br>30% travel with children | High accomplishments<br><br>Active<br><br>Older demographics so want sense of security | Sophisticated and confident travelers and genuine nature seekers<br>Trendy cosmopolitan cities<br>Affluent couples |

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### **Demand Generators**

New significant attractions and destinations that generate travel to the Province

- Define and develop criteria
- Identify and target potential demand generators
- Facilitate planning and explore investment opportunities with stakeholders

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### **Development / Research**

- Visitor Information Services Strategy: complete the 5-year VIS Strategy which addresses visitor information services from a customer and quality services perspective
  - Review recommendations
  - Develop tourism awareness campaign
- Evaluation of Travelway / Scenic Drives system from visitors' perspective

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# Strategic Objective #1

## Creative strategies

|                                 | Market:                                                                   |                                                                       |                                                            |                                                                          |                                                                                 |
|---------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------|------------------------------------------------------------|--------------------------------------------------------------------------|---------------------------------------------------------------------------------|
|                                 | Atl. Can.                                                                 | Quebec                                                                | Ontario                                                    | USA                                                                      | Europe                                                                          |
| <b>Beliefs</b>                  | Have seen it all - What's new?                                            | Quaint / traditional; too far to travel; love the beaches; Unfamiliar | Friendly/warm; traditional; laid-back lifestyle            | Base level awareness; too remote/ isolated, not sure where located; safe | Base level awareness; too remote/ isolated, not sure where located              |
| <b>Communication Objectives</b> | Product variety; Biggest urban centre in Atlantic Canada; Close proximity | New and welcoming; Some French service; Beach / coast, but much more  | Friendly with laid-back lifestyle; Unique seacoast scenery | Close proximity; Foreign but friendly; Value message                     | Excellent choice for existing Canada customers as second visit to North America |

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# Strategic Objective #1

## Creative strategies

|                                            | Market:                                                |                                                                        |                                                                           |                                                                       |                                                                                     |
|--------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                                            | Atl. Can.                                              | Quebec                                                                 | Ontario                                                                   | USA                                                                   | Europe                                                                              |
| <b>Common product elements</b>             |                                                        | Seacoast, touring, cuisine, history, culture, outdoor                  |                                                                           |                                                                       |                                                                                     |
| <b>Market-specific product / messaging</b> | Shopping, variety of specific products; Urban messages | Scottish culture, Cabot Trail, fishing villages, Louisbourg, diversity | Scenery unique to NS, Iconic history, Music/culture, Warmth of the people | Proximity, Foreign, a difference cultural experience, Value for money | Weather, accessibility, Halifax, Foreign but not too foreign, Safe, Value for money |
| <b>Channels</b>                            | Direct to consumer, Retail product specifics           | Direct to consumer, Mass reach media, Trade activity                   | Direct to consumer, Mass reach media, Trade Shows                         | Direct to consumers, Mass reach media, Trade Shows                    | Travel trade, FAMS and partnership programs                                         |

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## Strategic Objective #1

### Media strategies

|             | Market:   |        |         |     |        |
|-------------|-----------|--------|---------|-----|--------|
|             | Atl. Can. | Quebec | Ontario | USA | Europe |
| Internet    | X         | X      | X       | X   | X      |
| Television  | X         |        | X       | X   |        |
| Outdoor     |           |        | X       |     |        |
| Print       | X         | X      | X       | X   | X      |
| Direct Mail | X         | X      | X       | X   | X      |
| Promotion   |           | X      | X       | X   | X      |
| Editorial   | X         | X      | X       | X   | X      |

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## Strategic Objective #1

### Partnership opportunities

- **Atlantic Canada:**
  - Festivals and Events Guide; Spring, Summer and Fall Value Vacation Ideas; Winter Campaign opportunities (TBA).
- **Ontario:**
  - Ontario Motorcoach Annual Convention, Reader's Digest (Eastern Canada) advertising opportunities, targeted magazine insert
- **Quebec:**
  - Sélection du Reader's Digest, Montreal La Presse and Le Journal, travel trade shows, French Travel Guide, "Ici, on parle français" program

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- **Northeastern USA:**
  - Yankee Magazine, Fair and Friendly Exchange Program
- **Europe:**
  - Spotlight Canada, London
- **All Markets:**
  - *Publications (such as Spring, Summer, Fall Value Vacation Ideas) available online*
  - Doers & Dreamers' Guide, Travelways Map, Pocket Map
  - Destination Marketing & Product Development Assistance Program, Web Reciprocal Links Program
  - CTC Programs, NTA Show, ABA Show, Atlantic Canada Showcase

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## **Tourism Development Investment Programs**

- Tourism Product Development and Enhancement Program
- Tourism Market-Readiness Program

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**Improve the quality,  
competitiveness and  
sustainability of our product**

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**Ensure existing Demand Generators  
provide quality experience**

- Identify and define existing Demand Generators
- Evaluate the product/experience from a visitors' perspective
- Based on the evaluation, work with partners to develop management/visitor service plans

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### **Research Activities for 2003:**

- Preliminary discussion regarding 2004 VES
- Investigate options for assessing customer satisfaction
- Update economic impact model
- Enhancement of research methodologies

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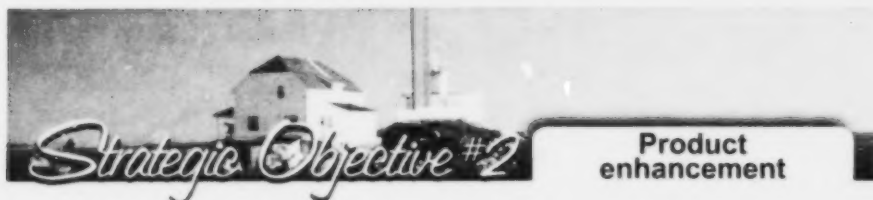


### **Bay of Fundy Enhancements**

- Implement Bay of Fundy Development Plan
- Encourage development of a Discovery Interpretive Centre
- Implement Ultimate Fundy Operator Program

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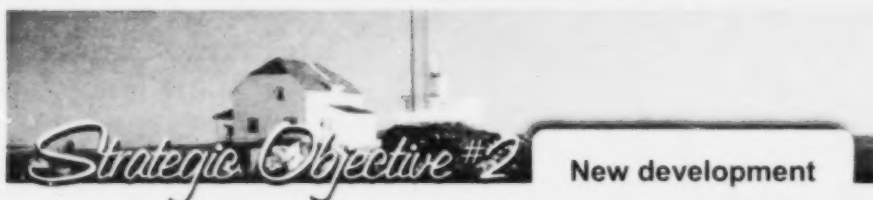
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- Development and enhancement of hiking / walking trails
  - Enhance accessibility (visibility), visitor amenities, interpretation at premier coastal hiking/walking trails
- Work with Acadian communities and partners to implement product development priorities to ensure readiness for upcoming celebrations

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### **Coastal experiences and access**

- Develop "market-readiness" check list for the development of lighthouse and beach products
- Develop an interpretative brochure detailing the diverse coastline experience
- Develop pull-off areas at scenic vistas by travelways/scenic drives to enhance the driving tour experience on secondary highways

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- Develop and implement market-readiness programs (e.g., Best Business Practices, French SuperHost, Sustainable Tourism Communities, educational seminars)
- Support education and training initiatives through the Tourism Human Resource Council
- Continue the implementation of *TradeSmart* program which educates and certifies tourism operators on best business practices within the travel trade

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#### **Quality Committee:**

- Now being established
- Establish sector quality guidelines
- Focus on overall tourism quality
  - Initially on accommodations and campgrounds
  - All other sectors of tourism to follow, such as restaurants and attractions

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**Develop and adopt sustainable Tourism codes of conduct and management principles for industry, government and travelers utilizing sound environmental practices**

- Increase awareness of sustainable practices
- Acknowledge those operators conducting sound environmental practices
- Promote current sustainable practices of Nova Scotia tourism operators to visitors
- Encourage responsible travel ethics/practices – Tread Lightly

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**Complete the Tourism Resource Values Modeling project**

- Implementation and follow up of Tourism Resources Valuation Model into IRM
- Evaluate the Tourism Resource Valuation Model pilot based on capability and usefulness of model, success of pilot
- Assess the suitability of the model for Phase II

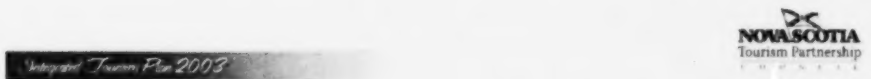
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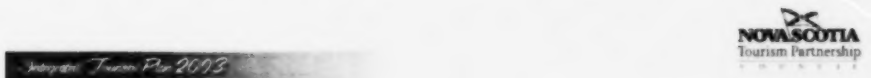


## **Built Heritage**

- Understand and support the value and integrity of built heritage to the Tourism sector



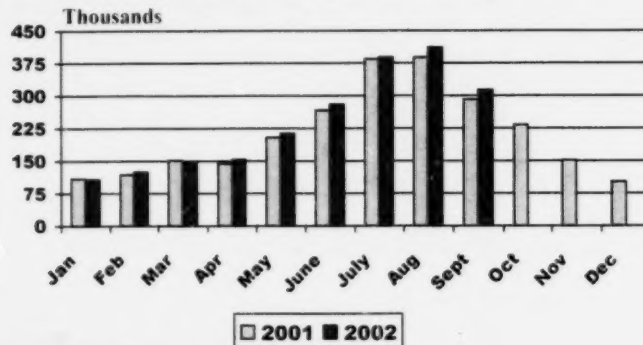
## **Build a 12-month season**



# **Strategic Objective #3**

## Room-nights sold

### Room-nights sold 2001 vs. 2002



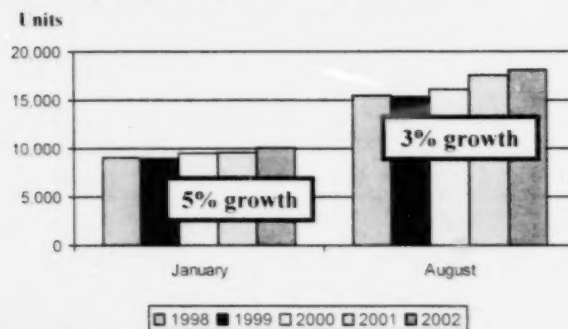
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# **Strategic Objective #3**

## Room supply

### Room supply: January & August 1998-2002(e)



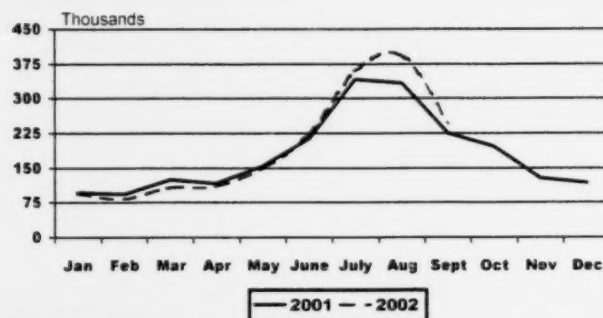
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## Strategic Objective #3

### Visitation

#### Visitation by month 2001 vs. 2002



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## Strategic Objective #3

### Research

- Conduct specific research on emerging products and trends with off-season potential
- Research existing product to determine current status, challenges and opportunities for expanding season and hours of operation

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## Strategic Objective #3

### New development

- Identify, support and facilitate the development of Demand Generators that operate on a year-round basis
- Develop and enhance new “purchasable” niche products and experiences
  - Cuisine/wine
  - Shopping excursions
  - Birding
  - Fall touring

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## Strategic Objective #3

### Product enhancement

- Expand seasonal opportunities at existing sites by implementing Living History Programs at historic sites, museums and communities to bring our history alive
- Develop experiences and packages based on our fall touring opportunities
- Enhance the outdoor nature experience by further developing birding sites and nature observation
- Work with DNR and other partners to develop plan to address issues such as operating season and product readiness at strategic Provincial Parks

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## Strategic Objective #3

### Industry development

**Work with tourism operators to develop quality, market-ready packages offering off-peak experiences:**

- Provide market intelligence on new market trends to tourism operators
- Develop a check list of critical elements for quality packages
- Deliver a mentoring program to facilitate package development and follow up

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## Strategic Objective #3

### Year-round marketing

|                     | Market:   |        |         |     |        |
|---------------------|-----------|--------|---------|-----|--------|
|                     | Atl. Can. | Quebec | Ontario | USA | Europe |
| Fall DM             | X         | X      | X       | X   |        |
| Pre-Christmas Print | X         |        |         |     |        |
| Winter DM           | X         |        |         |     |        |
| E-Marketing         | X         | X      | X       | X   | X      |
| Spring              | X         |        |         |     |        |

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## Develop viable niche markets

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### Develop viable niche markets:

- A third-tier priority in the Tourism Strategy, but overlaps with Touring and Seasonality objectives
- Targets customers who visit Nova Scotia for a specific reason
- Provides a product development focus and marketing content for touring consumers programs
- Current niche markets:
  - Meetings and Conventions, Golf, Outdoor/Nature, Group Touring (includes motorcoach & cruise)
  - New: Cuisine and Wine, Motorcycle

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- Golf (green-fee rounds) up 4% May-September, 2002
- Motor coach traffic up 27% January to September, 2002
- Outdoor product participation rates as indicated in the 2000

**Visitor Exit Survey:**

- General sightseeing 72%
- Leisure walking/hiking 55%
- Nature observation 34%
- Beaches/exploring 31%
- Birding 9%
- Wilderness hiking 7%
- Fishing and sight seeing by boat 5%
- Whale/seabird boat tours 5%
- Bicycling 2%
- Canoeing/kayaking 2%

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Focus will be on enhancing and developing the following niche products/experiences:

- Cuisine / Wine
- Shopping Excursions
- Birding / Nature Observation Experiences
- Fall Touring

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|                         | Market: |      |     |                   |                     |
|-------------------------|---------|------|-----|-------------------|---------------------|
|                         | Outdoor | Golf | M&C | Group /<br>Cruise | Cuisine and<br>Wine |
| Targeted<br>E-marketing | X       | X    |     |                   |                     |
| Specialty DM            | X       | X    |     |                   |                     |
| Specialty Print         | X       | X    |     | X                 | X                   |
| Collateral              | X       | X    | X   |                   | X                   |
| Editorial               | X       | X    | X   | X                 | X                   |
| Sales<br>Promotions     | X       | X    | X   | X                 |                     |

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### Partnerships:

- **Outdoor / nature:** Nova Scotia Adventure Tourism Association
- **Golf:** Golf Nova Scotia
- **Meetings and Conventions:** Destination Halifax
- **Group:** Tour Operator Partnership Program
- **Cruise:** Atlantic Canada Cruise Association
- **Cuisine and wine :** Taste of Nova Scotia
- **Motorcycle touring:** Nova Scotia Motorcycle Tour Guide

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## Improve transportation access

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**Air transport  
capacity**

### **Air capacity, May-October 2002:**

- 9% increase in seat capacity from domestic markets
- 8% increase in seat capacity in trans-border (USA) markets
- 49% decrease in seat capacity from international (overseas) markets
- Expecting 10% improvement in overseas capacity for 2003

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#### Actions for 2003

- **Strategic marketing partnerships with:**
  - Carriers (ferry, rail, and air)
  - International and domestic wholesalers partnerships
- **Concentration on overseas air routes**
- **Prospecting partnerships with:**
  - HIAA
  - TIANS
  - Destination Halifax
  - Greater Halifax Economic Partnership
  - Other

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#### Influencing policy

#### **Provincial / Territorial Tourism Ministers efforts to influence federal transportation policies:**

- Air traveler security charge
- Discontinuance of air service to communities
- Data quality and accessibility
- Air transport policy which considers users' interests
- Mitigating impacts of global airline restructuring
- Increasing competition in Canadian airline industry
- Increasing competition in domestic markets by relaxing foreign ownership limits

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CHALLENGE



## Improve the business environment for tourism

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- Explore alternative financing options for development of tourism
- Administration of tourism
  - Undertake a review to examine and implement an administrative structure that will support and enhance the Vision

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- **Overall Industry growth:**
  - Revenues
  - Visitation
  - Transportation access
  - Other measures
- **Marketing efficiency:**
  - Return on investment ("ad - generated revenues", inquiries, and conversion rates)
  - Awareness levels
- **Partner participation (product development and marketing):**
  - Overall financial leverage
  - Industry participation levels
- **Specific program evaluations**

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**Be a part of the plan:**

- Participate in industry organizations
- Let us know what you think
- Participate in partnership programs



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